

# Advanced Photon Source

PROCEDURE	Page 1 of 5
ICMS Content ID:	APS_1286337
Procedure #:	3.1.112
Revision #:	5
Issue Date:	10/21/14
Review Period:	1 year
Supersedes:	Rev. 4, 9/18/2013
Last Reviewed:	10/21/14

## Releasing APS Purchased Parts

### Section Where Used:

This procedure is used to release models obtained from vendors or used to represent the parts purchased from vendors into the PDMLink / Vault or equivalent database.

### Changes made in this revision:

- Removed DCC

### Prepared by:

B. Rusthoven, AES/DD

### Reviewed by:

AES/MED Group Leader

### Approved by:

ADD/AES-MIS

ADD/AES-CS

## Table of Contents

1	INTRODUCTION .....	3
1.1	Purpose.....	3
1.2	Scope.....	3
1.3	Applicability .....	3
1.4	Type of Procedure.....	3
1.5	Definitions .....	3
2	PROCEDURE.....	4
2.1	Modeling Steps .....	4
2.2	Approval Steps.....	4
3	FEEDBACK AND IMPROVEMENT .....	5

## Releasing APS Purchased Parts

### 1 INTRODUCTION

This procedure is used to release models obtained from vendors or created to represent the parts purchased from vendors into the PDMLink / Vault or equivalent database.

#### 1.1 Purpose

To document the process of controlling and releasing vendor models or models generated to represent the vendor parts

#### 1.2 Scope

- Representative Models Only

#### 1.3 Applicability

This procedure applies to APS personnel who use models obtained from vendors or create models to represent the vendors purchased parts.

This procedure is not used to release drawing files received from vendors to document as-built work. Drawing files received from vendors require the use of the Releasing AES Drawings ([Procedure # 3.1.108, APS 1281567](#)).

#### 1.4 Type of Procedure

Step-by-step procedure.

#### 1.5 Definitions

DCN – Document Change Notice

PDMLink / Vault – CAD drawing management system

Release level – One of three values – Work in Progress (WIP), Pending, or Released

DaD – Design and Drafting Group

Responsible Person - The individual creating the model that represents the vendor part use in their assembly

## 2 PROCEDURE

### 2.1 Modeling Steps

- 2.1.1 Responsible person creates model file of vendor parts.
  - 2.1.1.1 This can be a model obtained from the vendor or one created by the responsible person to represent the purchased part.
- 2.1.2 Responsible person checks the model created into PDMLink / Vault using the vendor's part number as the model name.
- 2.1.3 Responsible person assign a release level of WIP to the model in PDMLink / Vault
- 2.1.4 Once the model is completed, the responsible person initiates the approval process.

### 2.2 Approval Steps


- 2.2.1 Vault Steps
  - 2.2.1.1 Select the drawings, assemblies, parts and Purchased Parts to be released in Commonsplace.
  - 2.2.1.2 Add the files to an ECO:
    - 2.2.1.2.1 Select "Actions" or Right Click
    - 2.2.1.2.2 Select "New Change Order".
  - 2.2.1.3 Enter the Title Information and Description of changes
  - 2.2.1.4 Select the Appropriate Routing for the ECO.
  - 2.2.1.5 Select "Save" to commit the ECO.
  - 2.2.1.6 Edit the Routing information for the appropriate approvers.
    - 2.2.1.6.1 The following people are to be included in the approval routing, DaD Quality Assurance, the Responsible Engineer, their Group Leader or Responsible Project Leader or CAM, as appropriate, the DaD Group Leader and DCN Approver.
    - 2.2.1.6.2 Select "Save" to save the edited routing.
      - 2.2.1.6.2.1 If you receive an error message you do not have the proper roles assigned to the routing, verify step 2.2.1.6.1 and re-save.
  - 2.2.1.7 Submit the package for approval.

## 2.2.2 PDMLink Steps

2.2.2.1 Select the parts, drawings, assemblies and Purchased Parts to be released in Commonsplace.

2.2.2.2 Select “Action”, “New”, “New Promotion Request” from your toolbar.

2.2.2.3 Enter the Name and Description of the promotion. Select Next.

2.2.2.4 Verify the objects to be promoted are “Set for Promotion” . If not select the objects in the list and select “Set for Promotion”. Select Next.

2.2.2.5 Select the approvers for the promotion process. The “Resp Eng Approver” and the “Eng Grp Leader Approver” are the two adhoc fields that need to be completed.

2.2.2.5.1 Find the person you would like in each role by using “Find in tree” search and selecting the appropriate approver check box.

2.2.2.5.2 Verify the roles are set correctly by choosing “Selected Participants” from the “Participant List” view selector.

2.2.2.6 Select “Finish” to route the promotion request.

## 3 FEEDBACK AND IMPROVEMENT

If you are using this procedure and have comments or suggested improvements for it, please go to the [APS Policies and Procedures Comment Form](#) \* to submit your input to a Procedure Administrator. If you are reviewing this procedure in workflow, your input must be entered in the comment box when you approve or reject the procedure.

Instructions for execution-time modifications to a policy/procedure can be found in the following document: Field Modification of APS Policy/Procedure ([APS 1408152](#)).

\* [http://centraldocs.aps.anl.gov/comment\\_form.php](http://centraldocs.aps.anl.gov/comment_form.php)